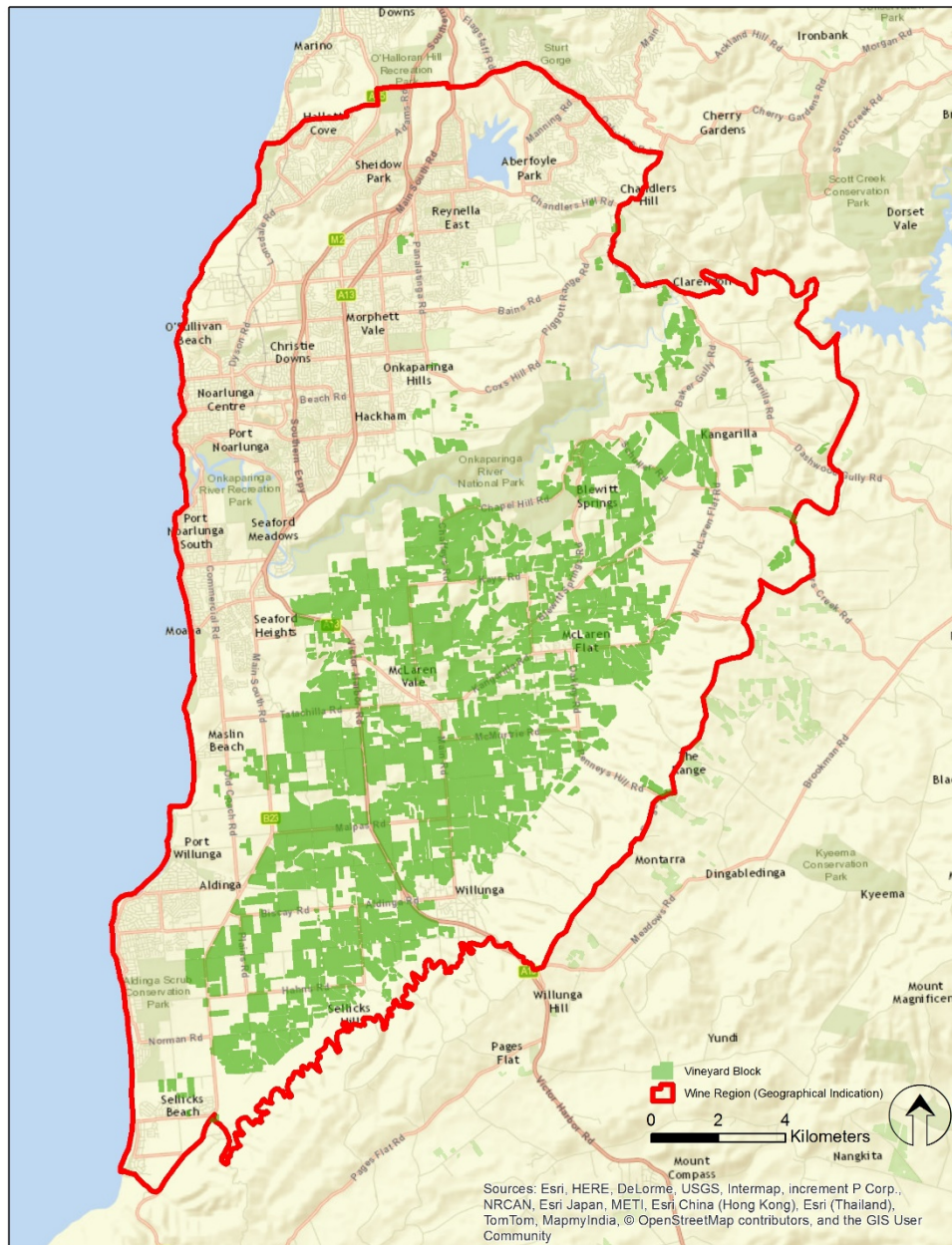


# SA Winegrape Crush Survey 2019

## Regional Summary Report

### McLaren Vale Wine Region

*Wine Australia July 2019*



DATUM: GDA94  
PROJECTION: MGA Zone 54  
DATE: 8<sup>th</sup> March 2017  
SOFTWARE: ESRI ArcGIS v10.4  
DATA SOURCE:  
Vineyard Block - Vinehealth Australia  
Wine Region - Wine Australia

## McLaren Vale Wine Region



DISCLAIMER: Although every effort has been made to ensure the accuracy of the information displayed, Vinehealth make no representations, either express or implied, that the information displayed is accurate or fit for any purpose and expressly disclaims all liability for loss or damage arising from reliance upon the information displayed.

# McLaren Vale

## Vintage overview

### VINTAGE REPORT

The McLaren Vale wine region relied on its advantage, natural and constructed, to have a successful vintage for 2019. Specifically, proximity to the moderating temperature influence of the Gulf St Vincent, reliable spring rainfall, and access to multiple irrigation sources helped vineyards cope with a challenging dry and hot season.

The growing season rainfall from October to the end of March was 142 mm, compared to the average of 172 mm, the deficit in rain occurring during summer. The dry conditions posed significant challenges for local grape growers; a lack of summer rain meant that irrigation was important to make up for the shortfall. Using timely irrigation, firstly to develop a canopy large enough to sustain vineyard crops and then to maintain the health of vines until harvest, was vital.

On the positive side, disease pressure (governed by rainfall, humidity and temperature) was very low for this vintage.

At harvest, vineyards generally had lower yields of fruit with more intense flavour. Vines had more open bunches, which weighed less than average. The reduction in vine size and yield is partly attributed to the summer, but also to two specific extreme weather events.

Firstly, there was an intense hail storm in late November. The storm saw high speed winds buffet vines and hail fell leaving scars on some fruit. Then in late January we experienced our hottest daytime temperature since January 2009, 45°C, plus several days in late February where the temperatures were about 38°C.

The combination of hail in November and hot weather in January and February is expected to reduce the overall size of our harvest compared to recent years.

*James Hook, McLaren Vale Grape, Wine and Tourism Association*

### OVERVIEW OF VINTAGE STATISTICS

The reported harvest from McLaren Vale was 33,038 tonnes in 2019, a reduction of 9 per cent compared with 2018.

There were 83 respondents to the survey who reported crushing grapes from McLaren Vale in 2019, compared with 78 in 2018.

Over the past five years (2014-18), the average crush has been 36,492 tonnes. This year's vintage was 9 per cent below the average. The largest reported crush in the past five years was the 2017 crush of 44,287 tonnes while the smallest was 28,434 tonnes in 2015.

The total estimated value of the fruit was \$59 million, very similar to last year (\$60 million) but down from \$71 million in 2017, reflecting the decreased tonnage. Overall, average prices increased by 4 per cent for red varieties and 11 per cent for white varieties.

The average price of Shiraz increased by 5 per cent to \$1958 per tonne – the highest since 2000, while Cabernet Sauvignon also increased by 2 per cent to \$1787 per tonne – the highest since 2002. The average price for Chardonnay increased by 11 per cent to \$871 per tonne.

The price dispersion data shows that this year 26 per cent of red grapes were purchased at \$2000 or above, compared with 24 per cent in 2018. For the whites, the vast majority (88 per cent) was purchased at between \$600 and \$1500.

There were 55 hectares of new plantings in McLaren Vale in spring 2018, compared with 48 hectares the previous spring. 96 per cent were red varieties, with 75 per cent being Shiraz. The total planted area as at 30 April 2019 is 7,337 hectares, 140 hectares less than in 2013.

*NB It is estimated that the reported crush under-estimates the total crush in McLaren Vale by around 25 per cent as a result of a low regional response rate.*

# McLaren Vale

## Winegrape intake summary table – red winegrapes

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
<b>Red</b>													
Barbera	11				5	6				10	47%	21	\$37,190
Cabernet Franc	44			7	28	9	\$80,477	\$1,818	-3%	12	21%	56	\$101,616
Cabernet Sauvignon	3,769			397	2,747	625	\$6,733,882	\$1,787	2%	3,070	45%	6,839	\$12,219,293
Durif	4				4					8	68%	11	\$16,800
Grenache	1,152		1	248	465	401	\$2,139,073	\$1,858	11%	727	39%	1,879	\$3,490,052
Lagrein	4				4					4	48%	7	\$11,040
Malbec	16			8	9		\$26,488	\$1,639		34	68%	50	\$82,749
Mataro/Mourvedre	349			91	204	46	\$585,774	\$1,676	8%	124	26%	473	\$793,396
Merlot	928			869	46		\$997,357	\$1,074	10%	396	30%	1,325	\$1,422,869
Montepulciano	3				3					15	83%	18	\$33,972
Muscat Rouge a Petits Grain:	37		37								0%	37	\$16,614
Nero d'Avola	25				2	23	\$54,712	\$2,197	7%	29	54%	54	\$118,395
Petit Verdot	53			46	8		\$55,503	\$1,043	11%	27	34%	80	\$83,786
Pinot Noir	253			232	21		\$274,887	\$1,086	27%		0%	253	\$274,887
Sangiovese	159			28	131		\$260,673	\$1,639	11%	226	59%	385	\$630,674
Shiraz	12,246			943	7,220	3,910	\$23,981,181	\$1,958	5%	5,868	32%	18,114	\$35,471,439
Tempranillo	185			10	145	29	\$336,887	\$1,824	-5%	115	38%	300	\$546,527
Other red	70			13	22	36	\$126,263	\$1,810	-4%	226	76%	295	\$534,707
<b>Red Total</b>	<b>19,308</b>		<b>38</b>	<b>2,891</b>	<b>11,063</b>	<b>5,084</b>	<b>\$35,698,385</b>	<b>\$1,849</b>	<b>4%</b>	<b>10,889</b>	<b>36%</b>	<b>30,198</b>	<b>\$55,886,007</b>

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

# McLaren Vale

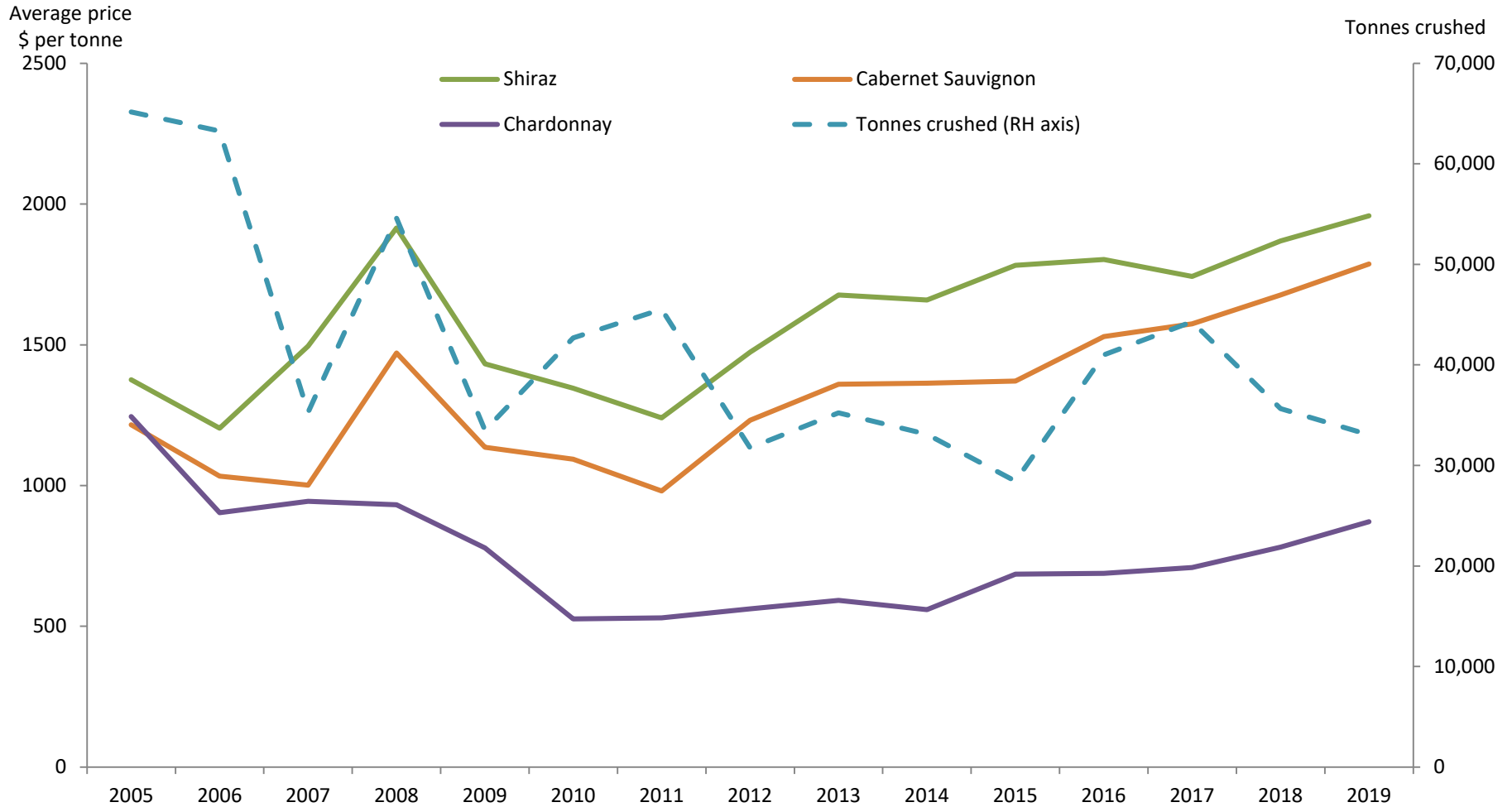
## Winegrape intake summary table – white winegrapes

	Total tonnes purchased	Price dispersion - number of tonnes in each price range					total value purchased grapes	Average purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
		< \$300	\$300 to <\$600	\$600 to <\$1500	\$1500 to <\$2000	\$2000+							
<b>White</b>													
Chardonnay	1,350		9	1,293	48		\$1,175,206	\$871	11%	344	20%	1,694	\$1,474,611
Chenin blanc	68			54	7	7	\$98,668	\$1,461		5	6%	72	\$105,241
Fiano	28				22		\$47,515	\$1,698	-1%	50	64%	78	\$132,734
Gewurztraminer	4			4							0%	4	\$4,026
Marsanne	45			45						23	34%	67	\$76,340
Muscat Blanc a Petits Grains	58			28	30		\$70,648	\$1,225		4	7%	62	\$76,135
Pinot Gris/Grigio	10				10					129	93%	138	\$262,757
Prosecco	8			8						2	23%	11	\$13,884
Riesling	105			90	15					6	6%	111	\$133,743
Roussanne										20	100%	20	\$29,281
Sauvignon Blanc	67			58	5	3	\$78,792	\$1,180	33%	59	47%	126	\$148,817
Semillon	1			1						46	98%	47	\$60,534
Verdelho	37			21	15		\$48,900	\$1,330	38%	44	55%	81	\$107,994
Vermentino	48				48		\$77,356	\$1,613	0%	18	27%	66	\$106,082
Viognier	110			104	6		\$139,084	\$1,261	14%	104	49%	214	\$270,076
Other white	15			14		1	\$20,782	\$1,379		34	69%	49	\$67,917
<b>White Total</b>	<b>1,952</b>		<b>9</b>	<b>1,720</b>	<b>206</b>	<b>11</b>	<b>\$1,964,202</b>	<b>\$1,006</b>	<b>11%</b>	<b>888</b>	<b>31%</b>	<b>2,840</b>	<b>\$3,070,171</b>
<b>Grand Total</b>	<b>21,260</b>		<b>46</b>	<b>4,612</b>	<b>11,269</b>	<b>5,095</b>	<b>\$37,662,586</b>	<b>\$1,771</b>	<b>5%</b>	<b>11,778</b>	<b>36%</b>	<b>33,038</b>	<b>\$58,956,178</b>

Note: Where there are fewer than three purchasers of a variety, the average price and total value are not reported to protect confidentiality.

# McLaren Vale

## Historical weighted average price vs tonnes crushed



# McLaren Vale

## Current plantings by variety and year planted – red winegrapes

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>Red winegrapes</b>						
Barbera	11	0	0	0	11	0%
Cabernet Franc	26	0	0	0	26	0%
Cabernet Sauvignon	1298	4	6	5	1314	0%
Grenache	446	1	4	4	455	1%
Mataro (Mourvedre)	85	4	3	0	92	0%
Merlot	202	0	0	1	203	0%
Petit Verdot	46	0	0	0	46	0%
Pinot Noir	51	0	0	0	51	0%
Sangiovese	44	0	0	0	44	0%
Shiraz	3979	31	50	41	4102	1%
Tempranillo	57	1	4	0	62	0%
Other Red	109	11	12	2	134	1%
<b>TOTAL RED WINEGRAPES</b>	<b>6354</b>	<b>52</b>	<b>79</b>	<b>53</b>	<b>6540</b>	<b>1%</b>

Source: Vinehealth Australia

# McLaren Vale

## Current plantings by variety and year planted – white winegrapes

Variety	Year planted				Total area	% planted in 2018
	Pre-2016	2016	2017	2018		
<b>White winegrapes</b>						
Chardonnay	323	0	0	2	325	1%
Chenin Blanc	17	0	0	0	17	0%
Marsanne	11	0	0	0	11	0%
Muscat a Petits Grains Blanc (White Frontignac)	10	0	0	0	10	0%
Pinot Gris/Grigio	21	0	0	0	21	0%
Riesling	32	0	0	0	32	0%
Sauvignon Blanc	56	0	0	0	56	0%
Semillon	28	0	0	0	28	0%
Verdelho	15	0	0	0	15	0%
Vermentino	4	0	0	0	4	0%
Viognier	51	0	0	0	51	0%
Other White	35	7	2	0	45	1%
<b>TOTAL WHITE WINEGRAPES</b>	<b>603</b>	<b>7</b>	<b>2</b>	<b>2</b>	<b>615</b>	<b>0%</b>
Rootstock Block	4	0	0	0	4	0%
Multi-purpose white	3	0	0	0	3	0%
Unknown variety	175	0	0	0	175	0%
<b>TOTAL ALL VARIETIES</b>	<b>7139</b>	<b>59</b>	<b>81</b>	<b>55</b>	<b>7337</b>	<b>1%</b>

Source: Vinehealth Australia



# Explanations and definitions

## AUSTRALIAN NATIONAL VINTAGE SURVEY

The information for this report has been collected and analysed by Wine Australia as part of the Australian National Vintage Survey. The SA Winegrape Crush Survey Report has been prepared by Wine Australia on behalf of the South Australian Wine Industry Association, Wine Grape Growers South Australia and Primary Industries and Regions SA.

Maps and planting data tables are provided by Vinehealth Australia (see notes on planting data tables).

The survey publication is available on Wine Australia's website [wineaustralia.com](http://wineaustralia.com), the Vinehealth Australia website [vinehealth.com.au](http://vinehealth.com.au) and via links from the Wine Grape Council SA website [wgcsa.com.au](http://wgcsa.com.au) and the South Australian Wine Industry Association website [winesa.com.au](http://winesa.com.au)

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Note: data published in this report supercedes that in earlier reports. Minor variations in reported figures can occur due to data revisions.

Any questions about the report should be directed to:

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# Explanations and definitions - continued

## **INTAKE (CURRENT VINTAGE) DATA**

### *Definition of regions*

Regions have been defined in accordance with Geographical Indication (GI) boundaries. If a GI region has not been declared, or produces less than 5,000 tonnes, then the data is aggregated into the relevant GI zone. Disaggregation of data into smaller regions such as Southern Fleurieu and Mount Benson is available on request from Wine Australia.

### *Total crush*

The total crushed is the total tonnes of grapes crushed from a particular source region, whether processed in that region, another region in SA or interstate. All wineries in Australia are included in the survey collection process. However, not all wineries respond to the survey - therefore the total tonnage reported may underestimate the true crush. It is estimated that the overall response rate for the survey is 88 per cent; however, individual regions may vary. Generally, regions will have a higher response rate when there is a high proportion of purchased winegrapes within the region.

Reported fruit is separated into fruit produced from the winery's own or associated vineyards ("own grown") and from independent vineyards ("purchased").

### *Calculated average purchase value*

The survey requests wineries to provide the total amount paid for each parcel of fruit purchased (or the price per tonne). This is the price paid for fruit of a particular variety at the point of receipt – NOT including freight. It includes any penalties or bonuses (eg Baumé) applied at the weighbridge, but DOES NOT INCLUDE other bonuses or adjustments such as end use quality bonuses, which are not available at the time the survey is conducted (May-June 2019).

The calculated average purchase value per tonne is the average amount paid per tonne of fruit across all wineries.

Winery grown grapes are not included in the calculation of average purchase value; nor are grapes grown by companies connected with the winery or under lease arrangements.

Average and total purchase values are not reported where there are fewer than three purchasers of a variety in a particular region. However the values are included in the calculation of totals for each region.

### **Important note on average purchase value**

There is considerable variation in the pricing arrangements made by different wineries. For example, some wineries make adjustment payments based on the average value per tonne reported in this survey and some pay quality bonuses based on the end use of the product. These additional payments are not included in the reported figures. The average price also does not give any indication of the distribution of prices, or variables that go into individual contracts.

### *Price dispersion data (shaded columns in Intake Summary tables)*

All purchases for each variety are grouped into price segments according to the price paid for that batch of fruit. The sum of tonnes in all the price segments may not match the total tonnes purchased where there are tonnes reported without an associated price.

### *Estimated total value of all grapes*

The estimated total value of all grapes is calculated by multiplying the average purchase value per tonne by all tonnes crushed. If there is a variety where there are no purchases, then the average purchase value for the same variety across similar regions, or across all other varieties of the same colour in the same region is used to determine an estimated value for the own grown grapes.

# Explanations and definitions - continued

## PLANTING DATA

### *Source of planting data tables*

Planting data is not collected by the Australian National Vintage Survey. The information is obtained from the vineyard register maintained by Vinehealth Australia.

Vinehealth Australia is required under the *Phylloxera and Grape Industry Act 1995* to maintain a complete and accurate register of vineyard owners in the state. Vineyard owners with plantings of 0.5 hectares or more are required to register with Vinehealth Australia, and provide details of any changes made to these vineyard plantings within three months of any such change. This information is kept strictly confidential and provided for this survey in a deidentified and aggregated manner.

### **Explanatory notes for planting data tables**

Regions are defined according to the Register of Australian Geographical Indications.

To protect confidentiality, the following rules are applied to reporting varieties:

- where there are fewer than 10 registered owners with plantings of a particular variety across the state, that variety is not separately identified in either the state or the regional reports but is grouped with “other red/white”, AND
- where there are fewer than three registered owners with a particular grape variety in a given region, that variety is not separately identified in the regional report but is grouped with “other red/white” unless it is a white variety listed in the top six, or red variety in the top five by planted area for the state for the current year.

- Planting data tables are current as at 30 April 2019 and include all plantings from the 2018-19 planting season.
- Reference to “other varieties” includes rootstock, multi-purpose and table-grape plantings.
- Vines planted in a particular year may include top-worked or replaced vines, as well as new plantings in virgin ground. Where vines have been replaced or topworked, the old variety record is removed. This explains why the area planted for earlier years may be different in the current report compared with previous reports.
- Where a zero (0) appears in a table, this may indicate the presence of a planting of less than 0.5 hectares, or it may indicate zero plantings. Rounding may produce slight discrepancies in totals.

For more information on the planting data in this report or about registration of vineyards, please contact the Vinehealth Australia office on (08) 8273 0550.